

## Strategic Planning Services

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To undertake a successful Strategic Planning process, FUND will employ the following approach:

*Phase 1: Environmental Scan.* FUND Consulting will administer a Strategic Plan Assessment Questionnaire to identify stage of organizational development. The FUND team will then conduct a kick-off call discuss the Assessment Questionnaire findings, clarify project goals, processes, timelines, etc. Following this, FUND will conduct a scan of the internal and external environments to serve as a framework for strategy development by informing a SWOT analysis. The scan will include an analysis of the external environment, up to 15 stakeholder interviews, an online staff survey, and an organizational assessment.

FUND will conduct the following as part of its Organizational Assessment:

- Gap Analysis to determine the organization's current stage of development, define its future stage, and to identify gaps between the current and future stages as a framework for strategic planning goal setting.
- Demographic analysis of organization's customer base and geographic markets.
- Rigorous analysis of information collected during the data collection phase resulting in a benchmark analysis of best practices and identification of operations and fundraising strengths, challenges, and opportunities.
- Political, Economic, Social, Technological (PEST) analysis to inform strategic planning SWOT analysis with a particular focus on emerging research, investment trends and current policy priorities in the field of community development finance.

*Phase 2: Facilitation.* FUND Consulting will facilitate multiple days of planning meetings with board members, the planning team, and management. The first day typically includes board members and the planning team, as designated by the client. The following day will be focused on action planning with the planning team. The facilitator will work to keep all agenda items on theme, and encourage use of the data collected to make informed decisions on goal and action plan development. Additionally, FUND facilitators are skilled in fostering strategy development that is realistic, on theme, and measurable.

During the first day, the facilitator will present a review of the environmental scan organizing the data into a SWOT to provide background on how the strategic issues were developed. This approach sets the stage for goal setting to be a process that yields realistic results, rather than using the session as a brainstorming session resulting in a "wish list". The FUND facilitator will work with the group to add or subtract to the list of strategic issues, using the consensus approach. With this approach, the facilitator makes sure that each participant either expresses agreement or concern. The facilitator ensures that each participant is given the same amount of time to express agreement, concerns, or ideas. The facilitator then synthesizes the conversation, presents key themes, and works with the group to achieve consensus. Once agreement is reached on each issue, the facilitator will focus the discussion on the creation of goals to address the strategic issues. The facilitator will spend time to ensure that the end result is a goal, and not a strategy to achieve a larger goal, using the SMARTER approach. On day two the FUND team will work with the planning team to create an action plan for each goal and related strategy. At the end of the session, the facilitator will assign a "champion" for each goal.

*Phase 3: Plan Development.* FUND Consulting will synthesize all the information from the session into a draft strategic plan document. The document will include the results of the environmental scan, the SWOT analysis, and present goals, strategies, and objectives with clear timelines, responsibilities, and guidelines for monitoring success. FUND will send a draft to the team and facilitate an online meeting to review the document noting any requested changes. After this review, FUND will deliver the final plan document.

*Phase 4: Implementation Follow-Up.* During the twelve-month period following delivery of the final Strategic Plan, FUND will check in with the client team regarding the implementation of action items, milestones achieved, and to review the achievement of metrics and measurable outcomes developed in the Strategic Plan.

All presentations and facilitated sessions will be done via remote video conferencing software unless mutually agreed upon by the Client and FUND Consulting.

## **Competitive Advantage**

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FUND Consulting is uniquely positioned as one of the only full-service consulting firms serving the CDFI industry with a track record of working with a broad range of CDFIs across the country. Our firm's wide-ranging CDFI expertise facilitates our in-depth research and analysis to develop comprehensive recommendations for organizations and to create quality and actionable plans that inform decision-making.

FUND Consulting stands out from its competitors in the following ways:

- With a staff of 15, FUND Consulting has a team with the diverse skill set necessary to manage and deliver the range of services responsive to the broad needs of community organizations. Our staff have advanced degrees in policy, planning, and public administration and are adept at accessing, leveraging, and fusing market, organizational, and policy research to inform data-driven recommendations.
- FUND Consulting has worked with over 350 community organizations throughout the US and has completed nearly 100 strategic plans, including 18 strategic plans over the last three years. This experience has given the team deep insight into organizational best practices, challenges, and differences across organizational types and markets. It also demonstrates our keen ability to facilitate planning sessions that are collaborative, consensus, and results driven for an extensive set of organizations.
- Founding Partner Lolita Sereleas has worked as adjunct faculty at DePaul University, teaching leadership and strategic planning courses at the graduate level.
- Four members of the FUND team are certified in Diversity, Equity and Inclusion (DEI) from the Yale School of Management.

## **Timeline**

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The project duration is 16 – 20 weeks.

## **Pricing**

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Please contact Jen Weitzel, Managing Consultant, at [jweitzel@fundconsulting.com](mailto:jweitzel@fundconsulting.com) for more information and to schedule a call to discuss your organization's strategic planning needs!